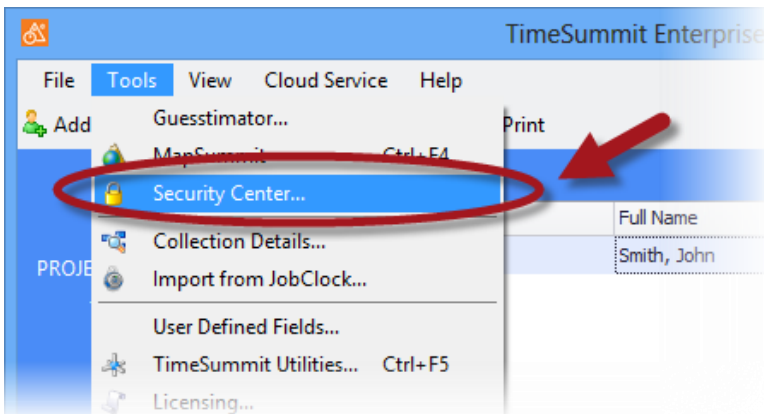


In order to manage what your employees can and can't do with ExakTime Mobile, you'll need to set up Security Roles. TimeSummit uses Security Roles to determine what permissions are assigned to each employee. This is a two-step process: first, you'll assign Permissions to a role; second, you'll assign Employees to the role.

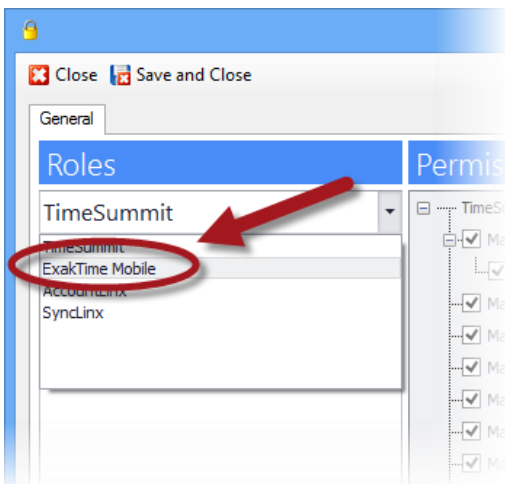
In this walkthrough, we'll be going over the Security Center screen, what the default roles are, how to add or remove Permissions from a role and finally how to assign an Employee to a role.

## Security Center

**Step 1:** First, let's navigate to the Security Center. Select **Tools** from the Menu Bar at the top left of the screen and then select **Security Center**.



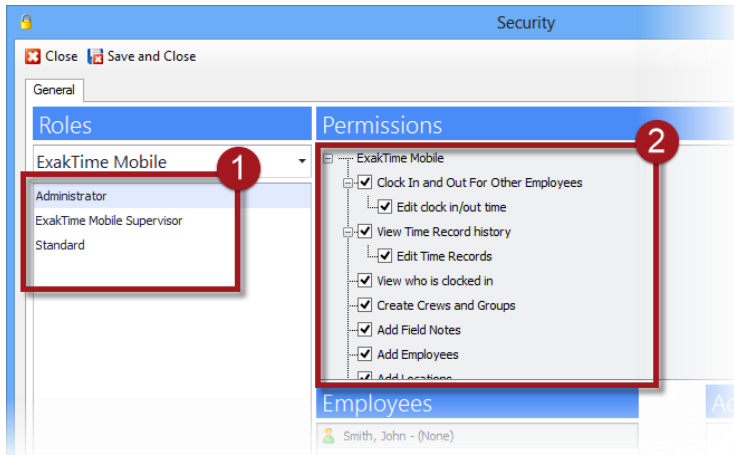
**Step 2:** In the Security Center window, select ExakTime Mobile from the drop down menu under **Roles**.



**Step 3:**

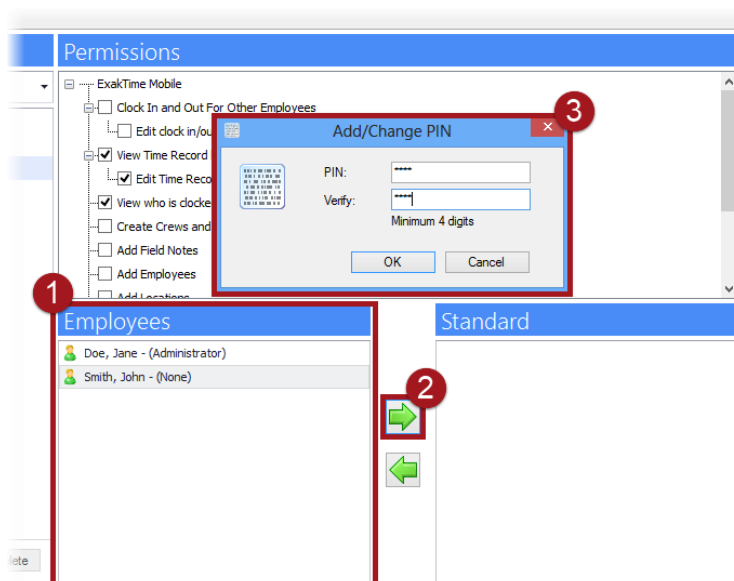
1. Select the User Role you would like to modify. You'll note that there are three default roles here: Administrator, ExakTime Mobile Supervisor and Standard. Please see the section below on "Default Roles".
2. After selecting a role, modify the Permissions for that role.

Click **Save and Close** when finished.

**Step 3:**

During or after setting up your user Permissions, you can assign your users to the *currently selected* role.

1. Select the Employee.
2. Press the arrow pointing to the right to move them into their respective role.
3. Give the Employee a PIN they will use to sign in and out of ExakTime Mobile. PIN codes need to be at least 4 digits and must be unique. You should use a number that the Employee will remember, but that isn't east to guess (i.e., 4215 might be the last four digits of the Employee's Social Security Number and would make for a good PIN; 1234 is very easy to guess and would make for a bad PIN).



## Default Roles

TimeSummit comes with three roles by default:

- **Administrator:** The Administrator Role should be assigned to whoever is the administrator in TimeSummit (whoever manages the software). This role has permission to do everything that can be done in TimeSummit, *including* editing time from a mobile device. This role should NOT be assigned to Employees who use ExakTime Mobile to track their time.
  - The Administrator Role *cannot* be edited.
- **ExakTime Mobile Supervisor:** This role is designed for Crew Leaders or Supervisors. Employees who oversee other employees and need to be able to clock in and out for them. It comes pre-built with the necessary permissions to clock in for other people, see who is clocked in on their device, and view the history of punches on their device. It also gives them the ability to create crews.
- **Standard:** This is the default role for any employee who only needs to clock themselves in and out. It has no special permissions.

Note: It is also possible to create a customized ExakTime Mobile role. For more on how to do this, please read **How To Create A Customized Security Role**

## Permissions

Each of the ExakTime Mobile Security Permissions is listed below with a brief overview of what that permission controls:

**Clock In and Out for Other Employees:** This permission allows a user to clock in and out for other employees. This respects Employee Curtaining (meaning that they can't clock in for Employees they don't have access to).

- **Edit clock in/out time:** This is a sub-permission of Clock In and Out for Other Employees. It can only be on if you have the above permission turned on. This permission allows the employee to edit punches they're making on the device for others. This type of editing is done at the time the punch is made by manually setting the time. You should NOT turn this on in most cases.

**View Time Record History:** This permission allows the user to view the past 2 weeks' worth of punches on their device, along with whether those punches have been synced back to TimeSummit.

- **Edit Time Records:** This is a sub-permission of View Time Record History. It can only be on if you have the above permission turned on. This permission allows the employee to edit punches that have already been made on the device from the history screen. They cannot, however, edit punches that have already been Synced to ExakTime Cloud Services. You should NOT turn this on in most cases.

**View Who Is Clocked In:** This permission allows the user to see who is clocked in on that device. This does not let them see who is clocked on other devices.

**Create Crews and Groups:** This permission allows the employee to create crew and group lists that help them organize information. Crews are a helpful way of clocking in for several people at once.

**Add Field Notes:** This permission allows the user to use the Field Notes feature of ExakTime Mobile.

Field Notes let employees send written notes, voice notes and photos from the field to the office, where they can be viewed in TimeSummit.

**Add Employees:** This permission allows the user to add a new Employee from their mobile device. This should NOT be turned on unless the user does hiring or needs to add new employee names in the field.

**Add Locations:** This permission allows the user to add a new Location (work site) from their mobile device. This should NOT be turned on unless the employee might need to add locations remotely.

**Add Cost Code:** This permission allows the user to add new Cost Codes from their mobile device. This should NOT be turned on unless the employee has to enter in new cost codes (activities, tasks, etc.) from the field.

**Cloud Service:** This permission allows the employee to see the Cloud Service screen on the mobile device, and allows them to change the credentials there. This should NOT be turned on for anyone but Supervisors and above.

**Change the device clock, edit preferences, set a default jobsite or cost code, beam data, and set jobsite locations (PocketClock/GPS only):** This is a catch-all permission that handles several different features. In general this should NOT be turned on as it allows the user to alter the clock on their mobile device and then clock in.

- Please note: ExakTime cannot stop an employee from changing the time on their mobile device. However, if we detect that a change has occurred, our app will lock the employee out until an Administrator uses their PIN to unlock the device.

**Take Photo When Clocking In/Out:** This feature must be on to use our "FaceFront" feature, which will take a picture of the employee when they clock in for themselves (this does not apply to clocking in for others).